

# Managing Programs

Totara Program management allows you to create learning paths for learners where you can define dependencies and control the order and flow of the competencies and courses your learners complete.

A program includes completion dates and time limits for your learners to complete each stage of the program. There is also the ability to set up customised messages and reminders that are sent to learners and managers as part of the program.

Program management allows you to enrol learners based on their organisation, position, management hierarchy, or audience, and set different completion criteria for each group if required. Learners can also be enrolled individually.

Program management also handles the requirement for courses to reoccur on a set cycle, such as yearly. This is great for handling compliance training that staff may be required to complete every year.

## Create a program

To create a program you will need to be logged in as a site administrator. If you have these permission you can then follow these steps:

1. From the **Administration** block follow the path *Site administration > Courses > Manage programs*.
2. Select **Add a new program** to set up a new program.
3. Complete the **Details** section (see below).
4. Select **Save changes** and the **Program Overview** tab displays. You have now created your program; the next step is to add the program content and program assignment.

## Details



When creating a new program there are a number of details you will be required to add, these are:

Setting	Description	Notes
<b>Category</b>	This is the name of the course category the program sits under.	-
<b>Visible</b>	When visible is checked the program can be seen by the learners.	-
<b>Full name /Short name</b>	This is the name of your program. The short name must be unique.	-
<b>ID</b>	This allows you to give your program an ID number if required.	-
<b>Availability</b>	When set to <b>Available to students</b> learners are able to view and access the program details.	-
<b>Available from /Available until</b>	This allows you to set a date range for when the program is available to learners.	-
<b>Description</b>	The description text displays in the search program page and when the learner is viewing the details of the program.	-
<b>Program end note</b>	The program end note displays when the learner has completed the program.	-

### On this page



The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.

<b>Program icon</b>	<p>To add custom program icons:</p> <ol style="list-style-type: none"> <li>1. Click <b>Courses</b> in the Site administration menu.</li> <li>2. Click <b>Custom icons</b>.</li> <li>3. Select the graphic file you want to use for a course.</li> <li>4. Move this file to the Program icon file area.</li> <li>5. Select <b>Save changes</b>.</li> </ol>	 Graphic files will be resized to 35 X 35 pixels automatically.
<b>Allow extension requests</b>	<p>When enabled users can submit extension requests for this program which can then be approved or denied by their manager.</p>	 Program extension requests need to be enabled on the <a href="#">Advanced features</a> page to be able to allow or disallow program extension requests for a program.

## Edit a program

Once a program has been setup it is still possible to make changes by editing the program.

1. From the **Administration** block follow the path *Site administration > Courses > Manage programs*.
2. In the table find the program you wish to edit.
3. Select the **Settings** icon, or alternatively select the program to open it, then select **Edit program details**.

Whilst editing a program you can amend the details, add content, assign learners, and manage messages. More about how to do each of these can be found below.

## Add program content

Program content can include any course or competency on your Totara site.

Content is added in sets. The sets represent the order in which learners complete the learning. A set can contain:

- A competency and assigned course(s)
- Course(s)

Time frames and conditions can be established for each set.

To add content to your program, follow these steps:

1. Go to the **Content** tab.
2. Select what you would like to add from the **Add a new** dropdown menu and select **Add**. Follow the instructions below for the content type you choose to add.

If	Then
Adding a course	<ol style="list-style-type: none"> <li>1. Select <b>Set of courses</b> from the <b>Add a new</b> dropdown menu and click <b>Add</b>.</li> <li>2. Click through the course categories and click on each of the courses you wish to add. You need to select your courses in the order you wish them to appear in the set.</li> <li>3. Selected course(s) appear in the current selection column, click the delete icon to remove the course from the program selection.</li> <li>4. Click <b>Ok</b> to complete the course selection. See also, <a href="#">course set settings</a> below.</li> </ol>
Adding competencies	<ol style="list-style-type: none"> <li>1. Select <b>Competency</b> from the <b>Add a new</b> dropdown menu and click <b>Add</b>.</li> <li>2. Select the competency framework from the dropdown list.</li> <li>3. Select the competency you wish to add.</li> <li>4. Click <b>Ok</b> to complete the course selection.</li> </ol> <p>When you select a competency that has a linked course(s). The linked course(s) is/are automatically pulled through into the set.</p> <p>See also, <a href="#">competency settings</a> below.</p>

Adding a recurring course	A program can only have one recurring course with no other courses or competencies. See <a href="#">Recurring Courses</a> to learn more.  See also, <a href="#">recurring course settings</a> below.
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- Give your set a name and complete the settings relevant settings (see below for more information).
- You can have one or more course sets. If you have more than one, you can choose the rule between them:
  - Or:** Learners can either complete the learning in the first course set or the second course set. The learning of both course sets is available at the same time.
  - Then:** Learners must complete the first course set before being given access to the second course set.
  - And:** If both course sets need to be completed.



Follow steps 2-4 above as required if you need to add additional content.

- A warning message appears. Click **Save all changes**. The content has now been added to your program and you are ready to set the learner assignments.




If a learner has already completed a course in the program content, it will be treated as such. The program enrolls the learner into the course and then checks for completion; the program itself has no effect on the completion record.

## Course settings

These are the available settings when adding a course set.

Setting	Description	Notes
<b>Set name</b>	The name you give to the course set.	-
<b>Learner must complete</b>	Choose either <b>One course, All courses</b> or <b>some courses</b> .  If you select <b>Some courses</b> you will then be able to edit additional fields to set the completion criteria, these fields are the <b>Minimum courses completed</b> , <b>Course score field</b> , and the <b>Minimum score</b> .  These fields are all locked when selecting <b>All courses</b> or <b>One course</b> as the completion of the selected courses is then the completion criteria.	-
<b>Minimum courses completed</b>	The minimum number of courses within this course set the assignees must complete for this course set to be considered complete.	-
<b>Course score field</b>	Specify a course custom field which is used to allocate a score to each course in the set. This is used in conjunction with <b>Minimum score</b> to determine the course set's completion criteria. The selected field should have numeric values e.g credit hours.	-
<b>Minimum score</b>	A minimum score that must be reached for the course set to be marked as complete. The score is calculated by summing the values from the <b>Course score field</b> for all the courses a user has completed.	For example, you might have a <b>Credits</b> custom field on your courses, so you could use this setting to mark a course set as complete when a certain number of credits have been achieved.

<b>Minimum time required</b>	<p>This determines the minimum amount of time that users should be given if they are to have enough time to complete the course set.</p> <p>Please carefully read the warning alongside this description.</p> <p>For example, if set to one week, then it is expected that the user should be granted at least one week to be able to complete the course set, and that it would not be possible to complete it in any time less than that.</p>	<div style="border: 1px solid red; padding: 10px;"> <p> Setting this does not mean the user only has a certain amount of time to complete a course set, nor does it set or affect the program due date.</p> <p>This does not determine the maximum time allowed to complete the course set and setting this does not set a due date.</p> <p>It is used to generate exceptions when a completion date set in the <b>Assignments</b> tab is insufficient and is used to automatically set a sufficiently generous due date when resolving time allowance exceptions using the <b>Set realistic time allowance</b> action.</p> </div>
<b>Courses</b>	The courses you selected to be part of the set.	-

## Competency settings

These are the available settings when adding a competency.

Setting	Description	Notes
<b>Set name</b>	You will need to give the competency set a name.	-
<b>Competency name</b>	The name of the competency or competencies you have selected.	-
<b>Minimum time required</b>	This determines the minimum amount of time that users should be given if they are to have enough time to complete the set.	-
<b>Courses</b>	This will show any courses associated to the selected competency.	-

## Recurring course set




These are the available settings when adding a competency.

Setting	Description	Notes
<b>Set name</b>	You will need to give the competency set a name.	-
<b>Course name</b>	The name of the competency or competencies you have selected.	-
<b>Minimum time required</b>	This determines the minimum amount of time that users should be given if they are to have enough time to complete the set.	-
<b>Recurrence</b>	This is how often the course set should recur.	-
<b>Course creation</b>	Course creation defines when the course should be copied and recreated. It relies on the start and end date specified in the course settings.	-

## Assign learners

Program assignment allows you to select the learners who need to complete the program. You can select users by organisation, position, audience, management hierarchy, or individually. Once you have assigned learners to the program, the system automatically takes care of course enrolment.

To assign learners to your program, go to the *Assignments* tab, select what you would like to add from the *Add a new* drop down menu and select **Add**. Follow the instructions below for the assignment type you choose to add.

If	Then
Adding by organisation	<ol style="list-style-type: none"> <li>1. Select <b>Organisation</b> from the <b>Add a new</b> dropdown menu and click <b>Add</b>.</li> <li>2. The organisation options appear. Click <b>Add organisations to program</b>.</li> <li>3. Select the organisation framework you want to use from the dropdown box.</li> <li>4. Select the organisation items you wish to assign to the program. The selected items appear in the current selection column. Select the <b>delete</b> icon to remove.</li> <li>5. Click <b>Ok</b> to complete the organisation selection.</li> </ol> <div style="border: 1px solid green; padding: 5px; margin-top: 10px;">  Select <b>All below</b> to include all users in the hierarchy structure below the selected organisation.         </div>
Adding by position	<ol style="list-style-type: none"> <li>1. Select <b>Positions</b> from the <b>Add a new</b> dropdown menu and click <b>Add</b>.</li> <li>2. The position options appear. Click <b>Add position to program</b>.</li> <li>3. Select the position framework from the dropdown box.</li> <li>4. Select the position items you wish to assign to the program. The selected items appear in the current selection column. Select the <b>delete</b> icon to remove.</li> <li>5. Click <b>Ok</b> to complete the position selection.</li> </ol> <div style="border: 1px solid green; padding: 5px; margin-top: 10px;">  Select <b>All below</b> to include all users in the hierarchy structure below the selected position.         </div>
Adding by audience	<ol style="list-style-type: none"> <li>1. Select <b>Audiences</b> from the <b>Add a new</b> dropdown menu and click <b>Add</b>.</li> <li>2. The audience options appear. Click <b>Add audiences to program</b>.</li> <li>3. Select the audience groups you wish to assign to the program. The selected audiences appear in the current selection column. Select the <b>delete</b> icon to remove.</li> <li>4. Click <b>Ok</b> to complete the audience selection.</li> </ol> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;">  To learn more about creating audiences, see <a href="#">Audiences</a>.         </div>
Adding by management hierarchy	<ol style="list-style-type: none"> <li>1. Select <b>Management hierarchy</b> from the <b>Add a new</b> dropdown menu and select <b>Add</b>.</li> <li>2. The management hierarchy options appear. Select <b>Add managers to program</b>.</li> <li>3. Select the manager name(s) and then choose the appropriate job (there may be more than one) applicable to the assignment. The selected manager(s) and their job assignment will appear in the current selection column. Select the <b>delete</b> icon to remove.</li> <li>4. Select <b>Ok</b> to complete the manager selection.</li> <li>5. Select <b>direct team</b> to add just the manager's direct reports or <b>all below</b> to add their direct reports and their staff's direct reports.</li> </ol>
Adding individuals	<ol style="list-style-type: none"> <li>1. Select <b>Individuals</b> from the <b>Add a new</b> dropdown menu and select <b>Add</b>.</li> <li>2. The individual options appear. Select <b>Add individuals to program</b>.</li> <li>3. Select the names you wish to assign to the program. The selected individuals appear in the current selection column. Select the <b>delete</b> icon to remove.</li> <li>4. Click <b>Ok</b> to complete the position selection.</li> </ol>

Set the due date for each group / individual you have assigned to the program. When setting the completion criteria you have two options:

- **Complete by:** allows you to set a fixed completion date.
- **Complete within:** allows you to set a completion date relative to an event. The events include:
  - The date the learner first logged in.
  - Position assignment date.
  - Job assignment date.
  - The date the learner completed another program.
  - The date a learner completed another course.
  - The date record in a profile field.
  - The date they were assigned the current program.

Select **Set fixed completion date** or **Set time relative to event** to save your completion criteria, then select **Save changes** and confirm your changes. Once saved, a confirmation message appears at the top of the screen. Your program assignments are now set.



Users are assigned to the program when the program user assignment [scheduled task](#) is run.

For assigned users that have been given a time exception, the program **due date** is not updated.

If a learner has been previously marked as having completed the program and subsequently new courses are added, or the path is changed to **then**, a learner will not need to go back and do these additional courses because they've already been marked complete for this program.

## Add program messages

You can create and customise automated messages which are emailed to users assigned to a program. You can also add an optional message for managers depending on the message type selected.

1. Create a program message by editing your certification and selecting the **Messages** tab. The enrolment message and exception report message is added by default for every program.
2. Select the message type from the **Add a new** drop down menu and select **Add**.
3. Add a subject line and message body.
4. Select **Send notice to manager** if you want to send a message to the manager of a learner at the same time the learner message is sent. If a learner has multiple job assignments with more than one manager, the message will be sent to all managers.
5. Select **Save changes** to save your message. You will be prompted to confirm your changes or you can choose to continue editing.

(This video is taken from the [Program and certifications](#) course in the Totara Academy, where you can access more resources and learning materials - including other videos).

## Message types

Message Type	Description
<b>Enrolment</b>	A message is sent to the learner when they are assigned to a program.
<b>Exceptions report</b>	A message is sent to site administrators when there are new exceptions on the program. An exception occurs when the system is not able to process an action related to the program, e.g. the completion date is set for 30 days from the position start date, but this field is empty for a user assigned to the program.
<b>Un-enrolment</b>	A message is sent when a learner is unenrolled from a program.
<b>Program due</b>	A message is sent to the learner a set number of days, weeks or months before the learner is due to complete the program. Add a <b>Trigger</b> to set when the message is sent.
<b>Program overdue</b>	A message is sent to the learner when the program completion date for the learner has passed. Add a <b>Trigger</b> to set when the message is sent.
<b>Program completed</b>	A message is sent when the learner completes the program.
<b>Course set due</b>	Sent a certain length of time before the current course set is due. The due date is calculated by adding the course set <b>Minimum time required</b> to the date the user started the course set.
<b>Course set overdue</b>	Sent a certain length of time after the current course set is due. The due date is calculated by adding the course set <b>Minimum time required</b> to the date the user started the course set.
<b>Course set completed</b>	This message will be sent whenever a course set is completed.
<b>Learner follow-up</b>	A message is sent to a learner a set period of time after they have completed the program. Add a <b>Trigger</b> to set when the message is sent.

## Variable substitution

You can insert variables into the subject and / or body of a message so that they will be replaced with real values when the message is sent. Variables should be inserted exactly as shown.

Variable	Description
% userfullname%	this will be replaced by the recipient's full name.
% username%	this will be replaced by the user's username.
% programfullname%	this is replaced with the full name of the program.
% completioncriteria%	this will be replaced by the completion criteria set in the assignment tab.
% duedate%	this will be replaced by the date assigned to the user to complete the program.
% managername%	this will be replaced by the manager's name. If a learner has multiple job assignments with more than one manager, a list of all manager names will be output, separated by commas.
% manageremail%	this will be replaced by the manager's email. If a learner has multiple job assignments with more than one manager, a list of all manager email addresses will be output, separated by commas.
% setlabel%	this is replaced with the course set label, when the message relates to course sets.

## Capabilities that can edit

It is possible to assign a variety of editing permissions within the program functionality. Anyone with one or more of the following capabilities will see an **Edit program details** button whenever they view a program. By clicking on this they will then see the **Overview** tab, followed by additional tabs based on the capabilities they have assigned to them as follows:

- **totara/program:configuredetails:** For the Edit tab.
- **totara/program:configurecontent:** For the Content tab.
- **totara/program:configuremessages:** For the Messages tab.
- **totara/program:configureassignments:** For the Assignments tab.
- **totara/program:handleexceptions:** For the Exceptions tab (this applies even if there are no exceptions currently).
- **totara/program:editcompletion:** For the Completion tab (the completion editor must be enabled in site config).

## Scenario

### Program containing a course and assigned a dynamic audience

A user in the dynamic audience enrolls in the course through the program and is later removed from the audience.

When the **External unenrol** action option for program enrolment is set to:

Setting	Consequence
<b>Unenrol user from course</b>	The user is unenrolled from the program as well as the course.
<b>Disable course enrolments</b>	The user is no longer enrolled in the program. Their enrolment in the course is suspended.
<b>Disable course enrolments and remove roles</b>	The user is no longer enrolled in the program. Their enrolment in the course is suspended.

If the user is added to the dynamic audience again and the **External unenrol** action option for program enrolment is set to:

Setting	Consequence
<b>Unenrol user from course</b>	The user is enrolled in the program and must again enrol from scratch in the course through the program.
<b>Disable course enrolments</b>	The user is enrolled in the program. Their enrolment in the course is restored together with previous roles.
<b>Disable course enrolments and remove roles</b>	The user is enrolled in the program. Their enrolment in the course is restored but without previous roles.